Ongoing How Do I Guide

Assessments

Family Assessment and Case Plan

How Do I…?	Selections	Tips & Guidelines
Initiate family assessment and case plan	▪ Click Create > Case Work > Ongoing Services > Family Assessment and Case Plan ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Family Assessment and Case Plan page, enter the applicable data/values on the available tabs. ▪ Click Save and click Close.	*If an approved Initial Assessment exists, you can select it to pre-fill into the Family Assessment and Case Plan.* *When you create a Family Assessment and Case Plan, the system will automatically create a Safety Assessment and Plan that is linked to the Family Assessment and Case Plan.*
Add a goal for a child, parent or family as a whole for family assessment and case plan	▪ On the Child Functioning, Parent/Caregiver Protective Capacities or Family Functioning tab, click the Insert button in the Goals group box. ▪ On the Case Plan Goal page, enter the goal and service/activities associated with the goal. ▪ Click Save and Close	*To add more than one service/activity for each goal, click the Insert button on the Services/Activities group box.*
Update narratives on family assessment and case plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Ongoing Services icon and click the pending Family Assessment and Case Plan link. ▪ On Child Functioning, Parent/Caregiver Protective Capacities or Family Functioning tab, enter the applicable changes. ▪ Click Save and click Close.	*Once a Family Assessment and Case Plan has been fully approved, a new Case Progress Evaluation needs to be created to update narratives or to add new goals.*
Update/complete family assessment and case plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Ongoing Services icon and click the pending Family Assessment and Case Plan link. ▪ On the Family Assessment and Case Plan page, enter the applicable data/values. ▪ On any tab on the page, select Approval from the Options list. ▪ Select Approve on Approval History page. Click Continue. ▪ Click Save and Close on the Family Assessment and Case Plan page.	*The Family Assessment and Case Plan cannot be approved until the Safety Assessment and Plan is completed.* *The worker or supervisor may override the system-calculated family service level shown on the Roles and Responsibilities tab of the Family Assessment and Case Plan page.* *The Family Assessment, Case Plan and Safety Assessment and the Case Plan Summary templates are accessed via the Options list of any tab on the page.*
Terminate a family assessment and case plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Ongoing Services icon and select the ongoing Family Assessment and Case Plan. ▪ On any tab on the page, select Terminate Plan from the Options list and click Go. ▪ On the Terminate Plan page, enter the reason data/values and select Approval from the Options list and click Go.	*A Family Assessment and Case Plan cannot be terminated if a pending Case Progress Evaluation exists.*

Plans

Safety Assessment and Plan

How Do I…?	Selections	Tips & Guidelines
Establish Safety Assessment and Plan	▪ Click Create > Case Work > Safety Assessment > Safety Assessment and Plan. ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Safety Assessment and Planning Selection page, choose copy or create.	
Update Safety Threat narrative and Safety Services	▪ On the Safety Assessment tab, complete the Safety Threat questions. ▪ On the Description of Safety Threats document in narrative form a description for each "Yes" response. ▪ Answer the questions on the Plan Analysis tab and add services via the Safety Plan Services page when applicable.	*If all analysis questions are "Yes" then add safety services by selecting the Add/Edit Services link on the Description of Safety Threat Tab.*
Update/complete Safety Assessment and Plan	▪ On the Cases outliner, click appropriate Case icon. ▪ Click Planning icon> Safety Assessment and Plan link. ▪ On the Safety Assessment and Plan page, enter the applicable data/values. ▪ On the Safety Assessment tab, select Approval from Options list. Click Save and click Close.	*The Safety Analysis and Plan and Safety Assessment templates may be accessed from any tab by selecting the appropriate value from the Options list.*

Out of Home Safety Plan

How Do I…?	Selections	Tips & Guidelines
Establish out of home safety plan	▪ Click Create > Case Work > Planning > Out of Home Safety Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Out of Home Safety and Planning page, enter the applicable data/values.	
Add new placement information	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning icon > pending out of home safety plan link. ▪ On the OHSP Placement Safety tab, click the Search link. ▪ On the Provider Search page, enter the applicable data/values and click the Search button. ▪ Click the provider and click Continue. *Note: If changing existing placement information, clicking the Remove link will remove the existing placement information and a Search link will display.*	*The ICWA Placement Provider Options box on the OHSP Jurisdiction tab contains six questions related to the placement of a Native American Indian child.*
Update/complete out of home safety plan	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning > pending out of home safety plan link. ▪ On the Out of Home Safety Plan page, enter the applicable data/values. ▪ Select Approval from Options list, click Go. ▪ Select Approve and click Continue. ▪ Click Save and click Close.	*The Out of Home Safety Plan template may be accessed via the OHSP Placement Safety tab by clicking the Text button.*
Terminate out of home safety plan	▪ On the Cases expando, click appropriate Case icon. ▪ Click Planning icon> ongoing out of home safety plan link. ▪ On the Out of Home Safety Plan page/ Jurisdiction tab, select Terminate from Options list. Click Go. ▪ On the Terminate Plan page, enter the applicable data/values. ▪ Select Approval from Options list, Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	

Permanency Plan

How Do I…?	Selections	Tips & Guidelines
Establish permanency plan	▪ Click Create > Case Work > Planning > Permanency Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Permanency Plan Select page, click the Copy link to copy an existing permanency plan or click the Create button to create a new permanency plan. ▪ On the Permanency Plan page, enter the applicable data/values.	*A permanency plan is completed within 60 days of an out of home placement. Subsequent permanency plans are due every 6 months. A Permanency Plan Due tickler will appear on the Ticklers outliner before the due date.*
Document TPR recommendation/ adoption referral	▪ On the ASFA Review tab, enter the applicable data/values.	
Document determination not to TPR	▪ On the TPR Exceptions tab, enter the applicable data/values.	
Add new placement information	▪ On the Placement tab, enter the applicable data/values. ▪ Click the Search link. ▪ On the Search page, enter the applicable data/values. ▪ Click the Search button. ▪ Select the provider and click Continue.	
Update/complete permanency plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the pending permanency plan. ▪ On the Permanency Plan page, enter the applicable data/values. ▪ On the Basic tab, select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*The Permanency Plan template may be accessed selecting Permanency Plan from the Options list and clicking Go.* *The Permanency Plan template contains many fields which pre-fill information from various windows in the system. A template mapping document is available on the Knowledge Web for detailed template information.*
Terminate permanency plan	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the ongoing permanency plan. ▪ On the Basic tab, select Terminate from the Options list. Click Go. ▪ On the Terminate Plan page, enter the applicable data/values. ▪ Select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	

Permanency Plan Review Or Hearing Results

How Do I…?	Selections	Tips & Guidelines
Create the Permanency Plan Review Or Hearing Results page	▪ Click Create > Case Work > Planning > Permanency Plan Review/Hearing Result. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Permanency Plan Review Or Hearing Results Select page, click the Copy link to copy an existing permanency plan review/hearing or click the Create button to create a new permanency plan review/hearing. ▪ On the Permanency Plan Review Or Hearing Results page, enter the applicable data/values.	*A permanency plan review should be completed within 6 months of the Initial Removal from home. Subsequent reviews should be held every 6 months thereafter.* *A permanency plan hearing should be completed within 12 months of the Initial Removal from home. Subsequent hearings should be held every 12 months thereafter.* *Permanency Plan Review/Permanency Plan Hearing ticklers will appear on the Ticklers outliner before the due date.*
Document a Permanency Plan Review	▪ On the Permanency Plan Review Or Hearing Results page, choose the 'Perm Plan Review (6 months)' value in the Type field. ▪ Complete the following tabs: Basic, Placement, Permanency Plan Information, Panel Determinations and Recommendations	*The fields on the Panel Determinations and Recommendations tab are required if the Type of review is 'Perm Plan Review (6 months)'.* *The Review of the Permanency Plan template may be accessed selecting Permanency Plan from the Options list and clicking Go.* *The Review of the Permanency Plan template contains many fields which pre-fill information from various fields on the Plan Review Or Hearing Results page. A template mapping document is available on the Knowledge Web for detailed template information.*
Document a Permanency Plan Hearing	▪ On the Permanency Plan Review Or Hearing Results page, choose the 'Perm Plan Hearing (12 months)' value in the Type field. ▪ Complete the following tabs: Basic, Placement, Permanency Plan Information, Judicial Determination	*The fields on the Judicial Determination tab are required if the Type of review is 'Perm Plan Hearing (12 months)'.*
Update/complete Permanency Plan Review Or Hearing	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Planning icon and select the pending permanency plan review/hearing. ▪ On the Permanency Plan Review Or Hearing Results page, enter the applicable data/values. ▪ On the Basic tab, select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	

Plans (continued)

Create and edit Administrative Letters and Notices	▪ Click Create > Case Work > Planning > Admin Review Letters or Notices ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ Open the text template from the drop down list on the page and enter the applicable data/values.	*No approval is needed for Administrative Letters and Notices.* *Only the most recent edit on the Administrative Letters and Notices get saved in the database.* *Multiple Administrative Letters and Notices can be created for the same participant.*

Family Interaction Plan

How Do I…?	Selections	Tips & Guidelines
Complete family interaction plan	▪ Click Create > Case Work > Planning > Family Interaction Plan. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Forms page, select Family Interaction Plan from Options list. Click Go button. ▪ On the Family Interaction Plan template, enter the applicable data/values. ▪ Click Close and Return to eWiSACWIS. ▪ Click Save and click Close.	

WiSACWIS Help Desk (866) 335-2180
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WiSACWIS Knowledge Web

http://dhfs.wisconsin.gov/wisacwis/knowledge_web/index.htm

Case Progress Evaluation

How Do I…?	Selections	Tips & Guidelines
Initiate case progress evaluation	▪ Click Create > Case Work > Ongoing Services > Case Progress Evaluation ▪ Click the appropriate case. ▪ Click the Create button. ▪ On the Case Progress Evaluation page, enter the applicable data/values.	*The safety threats, narratives and goals from the Family Assessment and Case Plan will pre-fill into the initial Case Progress Evaluation. Subsequent Case Progress Evaluations will pre-fill with the most recently approved Case Progress Evaluation.* *When you create a Case Progress Evaluation, the system will automatically create a Safety Assessment and Plan that is linked to the Family Assessment and Case Plan.* *A Case Progress Evaluation Due tickler will appear on the Ticklers expando before the due date. The tickler will be deleted and reset once the supervisor approves the evaluation.*
Record progress toward achieving specific goals	▪ On the Case Progress Evaluation page/respective tab, click the Progress link for the specific goal for the appropriate participant ▪ On the Case Plan Goal Progress page, enter the applicable data/values.	
Update/complete case progress evaluation	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Ongoing Services icon and select the pending Case Progress Evaluation link. ▪ On the Case Progress Evaluation page, enter applicable data/values. ▪ On any tab on the page, select Approval from the Options list and click Go.	*The worker or supervisor may override the system-calculated family service level shown on the Family Service Level tab of the Case Progress Evaluation page.* *The Case Progress Evaluation, Safety Assessment and Case Closure and the Case Progress Evaluation templates may be accessed from any tab's Options list and clicking Go.*
Terminate a case progress evaluation	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Ongoing Services icon and select the ongoing Case Progress Evaluation. ▪ On any tab on the page, select Terminate Plan from the Options list and click Go. ▪ On the Terminate Plan page, enter the reason data/values and select Approval from the Options list and click Go.	*A Case Progress Evaluation cannot be terminated if a pending Case Progress Evaluation exists.*

In Home Service

In Home Service

How Do I…?	Selections	Tips & Guidelines
Document a new in-home service	▪ Click Create > Case Work > Placement > In Home Service. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the In Home Service page/Service tab, enter the applicable data/values. ▪ On the Provider tab, click the Search link ▪ On the Search Provider Service page, enter the applicable data/values and click the Search button. ▪ Select the provider and click Continue. ▪ On the Provider tab, enter applicable data/values. ▪ On the Service tab select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	*Be careful to **enter** the amount in the **Child Specific Rate** field only **after** entering all other applicable data/ values on the Service tab.* *If you enter the child specific rate before entering any supplemental points that may apply and/or other amounts that may apply, the system will delete the child specific rate amount (and consequently no payment will be sent to the provider).* *eWiSACWIS allows multiple In-Home Services to be documented.*
End an in-home service	▪ On the Service tab, select Placement Ending from the Options list. Click Go. ▪ On the Service Ending page, enter the applicable data/values and Select Approval from the Options list. Click Go. ▪ Select Approve and Click Continue. ▪ Click Save and click Close.	

Ongoing How Do I Guide

Adoption Referral/TPR

Adoption Referral

How Do I…?	Selections	Tips & Guidelines
Initiate adoption referral	▪ Click Create > Case Work > Adoption > Adoption Referral. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Adoption Referral page, enter applicable data/values.	*The Ongoing worker completes the General, Birth Parents, Background, and Placements tabs on the Adoption Referral page. The Adoption worker is responsible for completing the Child Summary and Matches tabs of the Adoption Referral page.* *The Adoption Referral page may be started on the CPS Family Case prior to TPR. When the child is deactivated for reason of TPR, the Adoption Referral is copied to the child's pre-adoptive case via a batch process.*

Add a sibling to sibling information at the time of referral	▪ On the General tab, click the Insert button
	▪ On the Search page, enter the applicable data/values and click the Search button.
	  ▪ For a match: Click the radio button for the applicable person and click Continue.
	  ▪ For no match: Click the Create button to access the Person Management page. Enter all applicable data/values. Click the Save button and then the Close button on the Person Management page. On the Search page, click Continue.
	▪ Enter the Applicable data/values.
		When the Adoption Referral is first created, potential sibling information will pre-fill based on participants documented on the Maintain Case page.

Delete a sibling from sibling information at the time of referral	▪ On the General tab, click the Delete link associated with the sibling to be removed from the Adoption Referral. ▪ A message displays verifying you want to delete the selected information. Click 'Yes' to delete. ▪ Click the Save button.	*All identified siblings can be deleted at one time by unchecking the Child Has Siblings checkbox.*
Update child's placement history/ information	▪ On the Placement tab, enter the applicable data/values. ▪ If appropriate, click the Address expando to view child's current placement address.	

TPR

How Do I…?	Selections	Tips & Guidelines
Document TPR	▪ On the Cases outliner, click on the case name link. ▪ On the Maintain Case page, select the Deactivate link for the appropriate participant to be deactivated (child to be TPR'd). ▪ On the Participant Status page, select TPR as the reason, enter the effective date, and additional applicable data/values. Click the Save button and click Close. ▪ In the Deactivate Participant message box, click Yes. ▪ On the Maintain Case page for the child who has been TPR'd, enter the applicable data/values. ▪ Click Save and click Close.	*The effective date must be the TPR date.* *If there is an AFCARS tickler for the child, the system will prevent deactivating the child for TPR until the AFCARS errors are corrected and the tickler is deleted.* *eWiSACWIS automatically creates a new case for the child who has been TPR'd and immediately displays the Maintain Case page for the new case.* *Note: For the child's new case, you'll select Pre Adoptive Child for the Case Type value.*